Tobias Brewer, Tyler Brewer, Trevor Brewer & Torilyn Brewer (GUARD/P) Case No. 11CEPR00896

Guardian Beck, Melanie (pro per – maternal grandmother)
Petitioner Brewer, Tabitha (pro per – mother)

Petition for Visitation

			TABITHA BREWER, mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
			, , , , , , , , , , , , , , , , , , ,	
			MELANIE BECK, maternal grandmother, was appointed Guardian of the minors on 12/05/11.	 Need Notice of Hearing. Need proof of service by mail at least 15 days before the
Со	nt. from		01112/03/11.	hearing of Notice of Hearing
			Father: DAVID BREWER	with a copy of the Petition for
	Aff.Sub.Wit.			Visitation <u>or</u> Consent & Waiver
√	Verified		Paternal grandfather: UNKNOWN	of Notice <u>or</u> Declaration of
	Inventory		Paternal grandmother: TERRIE	Due Diligence for:
	PTC		DUMICHELLE	a. Melanie Beck (guardian – maternal grandmother)
	Not.Cred.		Maternal grandfather: STEVE MOORE	b. David Brewer (father)
	Notice of	Х	<u> </u>	c. Paternal grandfather
	Hrg		Petitioner requests unsupervised visits	d. Terrie DuMichelle (paternal
	Aff.Mail	Х	with all 4 of her children. She would	grandmother)
	Aff.Pub.		also like to have overnight visits. She states that she completed a 90 day	e. Tobias Brewer (minor) f. Tyler Brewer (minor)
	Sp.Ntc.		inpatient program at Westcare and an	1. Tylei biewei (Hilliot)
	Pers.Serv.		outpatient program at Turning Point.	
	Conf.		Petitioner states that she would like to	
	Screen		have the visits court ordered because	
	Letters		her sister is threatening to call CPS if the guardian allows unsupervised visits.	
	Duties/Supp		Petitioner states that she has never lost	
	Objections		contact with her children or gone more	
	Video		than a couple of days without talking to	
 	Receipt		them.	
	CI Report			
	9202			
	Order			Pavianced by IF
	Aff. Posting			Reviewed by: JF Reviewed on: 09/23/15
	Status Rpt UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 1 – Brewer
<u> </u>	1 ID HOICE	<u> </u>		THE I DIEWEL

2

Case No. 12CEPR00197

Attorney

Olivia T. Issa (Estate)
Feist, Raymond Frank, Jr. (for Executor May Issa Lorah) Probate Status Hearing RE: Filing of the Final Account

DO	D: 4/28/01	MAY ISSA LORAH, daughter, was appointed Executor	NEEDS/PROBLEMS/
		with Full IAEA without bond on 4/2/12.	COMMENTS:
-		Background: On 5/30/12, Ms. Lorah filed a Petition to	1. Need Final
-		Determine Ownership of Estate Property and for Order	Inventory and
	Aff Code Mark	Authorizing and Directing the Transfer of Estate	Appraisal.
	Aff.Sub.Wit.	property to Claimant under Probate Code §850, which requested confirmation of a 10% ownership interest in	2. Need First
	Verified	Quetico, LLC, an order confirming that the Estate of	Account or
	Inventory	Murched "Mike" Issa, San Diego Superior Court Case	Petition for Final
	PTC	37-2011-00150022-PR-LS-NC (this decedent's post-	Distribution.
	Not.Cred.	deceased spouse) has no ownership interest in the	
	Notice of	LLC.	
	Hrg	JANE B. LORENZ, as Special Administrator for the ESTATE	
	Aff.Mail	OF MURCHED MARK ISSA filed a motion to transfer the	
	Aff.Pub.	petition to be heard in San Diego Superior Court .	
	Sp.Ntc.	-	
	Pers.Serv.	On 10/29/12, the Court granted the motion and	
	Conf. Screen	ordered the petition transferred to San Diego Superior	
 	Letters	Court.	
<u> </u>	Duties/Supp	Executor filed a Report of Status on 9/3/15 that states	
	Objections	the estate is not in a position to close. A Case	
	Video	Management Conference on the above-referenced	
	Receipt	petition was continued to 1/9/15. On 1/9/15, the Court	
 	CI Report	 sustained all objections to judicial notices and ruled on stipulated facts that the Quetico asset was community 	
—	9202	property of the marriage. Decedent's consent to the	
~	Order	purchase agreement did not constitute a sufficient	
	Aff. Posting	transmutation to change its community property	Reviewed by: skc
	Status Rpt	characterization under Family Code §760. Although	Reviewed on: 9/21/15
	UCCJEA	the Court confirmed that Quetico was community	Updates:
	Citation	 property, the issue regarding whether the 10% remaining interst should be probated in Olivia's or 	Recommendation:
	FTB Notice	Murched's estate has not yet been determined. The	File 2 – Issa
		matter has been continued to 9/11/15.	
		Supplement to Status Report filed 9/17/15 states on	
		9/11/15, Honorable Julia C. Kelety, Judge of the San Diego Superior Court granted the petition. Therefore,	
		upon procuring the Quetico asset, the estate will be in	
		a position to close. It is hereby requested that	
		administration be extended until 4/30/16 in order to	
		allow Petitioner to marshal this asset and close this	
		estate.	

3 Leticia Wilson (GUARD/P) Case No. 12CEPR00762 Petitioner Palacios, Shannalee (Pro Per – Mother)

Petitioner Palacios, Shannalee (Pro Per – Mother)
Attorney Kirkland, Alexia (for Katie Cipolla – Objector)
Petition for Visitation

Age: 5 years			SHANNALEE PALACIOS, mother, is	NEEDS/PROBLEMS/COMMENTS:
Cont. from 082715 Aff.Sub.Wit. Verified		5	petitioner. Please see petition for details	Minute Order of 08/27/2015: Matter is continued for proper service as to the father, Martin Mendoza, and Katie Cipolla, guardian. Any response by Ms. Cipolla is to be filed and served by 09/17/2015.
	Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report	w/		 Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Visitation for: Martin Mendoza (Father) Note: Declaration of Due Diligence filed 09/17/2015 states petitioner went to father's last known address and spoke to his mother and sister. They do not know his current whereabouts however they do believe he is in Mexico. Notice of Hearing filed 09/17/2015 indicates the father, Martin Mendoza, was served by mail c/o Nena Mendoza. Service must be directly to the individual and cannot be in c/o another individual.
	Order	Х		individual.
	Aff. Posting			Reviewed by: LV
	Status Rpt			Reviewed on: 09/22/2015
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 3 – Wilson

4 Armen Kiramidjian (Estate)

Atty

Case No. 13CEPR00359

Renge, Lawson K. (for Betty Phillips and Rose Lee Little – sisters/co-executors)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

Cont. from 080814, 102314 , 012115, 042215, 062415, 070915 Aff.Sub.Wit.
102314 , 012115, 042215, 062415, 070915
102314 , 012115, 042215, 062415, 070915
Verified
Inventory
PTC
Not.Cred.
Notice of
Hrg
Aff.Mail
Aff.Pub.
Sp.Ntc.
Pers.Serv.
Conf.
Screen
Letters
Duties/Supp
Objections
Video
Receipt
CI Report
9202
Order Aff. Posting
Status Rpt
UCCJEA
Citation
FTB Notice

BETTY PHILLIPS and **ROSE LEE LITTLE**, sisters, were appointed Co-Executors with full IAEA and without bond on 06/11/13. Letters Testamentary were issued on 06/11/13.

Inventory & Appraisal, partial no. 1, filed 02/13/14 - \$615,000.00

Inventory & Appraisal, final, filed 07/17/14 - \$63,096.95

Status Report filed 09/22/15 states: a request for default judgment against Karlie Steinhauer and Jamie Rust, defendants in the civil action Phillips and Little vs. Steinhauer and Rust was filed on 05/26/15. A judgment against Steinhauer and Rust is necessary for inclusion as an asset of this Estate. As of 09/22/15, Petitioner is still waiting for a Judgment to be entered by the Court. The Judgment is in excess of \$56,000.00. Upon entry of the judgment against Steinhauer and Rust, it is believed that the estate will be in a condition to be closed.

NEEDS/PROBLEMS/COMMENTS:

CONTINUED FROM 07/09/15 Minute Order from 07/09/15 states: It

has been confirmed that the default has not yet been processed in the Civil department.

 Need Account/Report on Waiver of Account and Petition for Final Distribution <u>and/or</u> current written status report.

Reviewed by: JF

Reviewed on: 09/21/15

Updates: 09/22/15

Recommendation:

File 4 – Kiramidjian

4

Robert Rusconi (Estate)
Pinion, G. Bryan (for Jacki Driver – Executor)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 1/09/13	JACKI DRIVER, girlfriend, was appointed	NEEDS/PROBLEMS/COMMENTS:
303.1,07.10	Executor with full IAEA and without	
	bond on 12/05/13. Letters Testamentary	Continued from 8/7/14, 9/25/14,
	were issued on 12/05/13.	<u>12/4/14</u>
Cont. from 080714,		
092514, 120414,	Inventory & Appraisal filed 11/25/14 -	Note: Minute Order 12/4/14 indicates
062515	\$262,500.00	that an amended Inventory and Appraisal will be filed.
Aff.Sub.Wit.		Appraisal will be lilea.
Verified		Minute Order 6/25/15: Counsel
Inventory	1	represents that mediation is set for
PTC	1	the end of July regarding a lawsuit
Not.Cred.	1	involving real property/damages to
Notice of	1	the real property that should be included in the estate; he requests 3
Hrg		months. If the final I&A is not filed at
Aff.Mail	1	least two court days prior to 9/24/15,
Aff.Pub.		then a written status report verified
Sp.Ntc.	1	by his client is to be filed.
Pers.Serv.	1	As at 0/01/15 modeling finished to be
Conf.	1	As of 9/21/15, nothing further has been filed.
Screen		been med.
Letters		The following issue remains:
Duties/Supp		
Objections		1. Inventory & Appraisal filed
Video	1	11/25/14 is marked that it is a
Receipt		final Inventory & Appraisal, however item 3 is marked that the
CI Report		assets inventories only represent
9202	1	a portion of the estate. Therefore
Order	1	it appears that there may be
		additional estate assets to
		inventory. Need clarification
		and/or amended final I&A.
Aff. Posting	_	Reviewed by: JF/skc
Status Rpt	1	Reviewed by: 31/386
UCCJEA	1	Updates:
Citation	1	Recommendation:
FTB Notice	1	File 5A – Rusconi
	•	5Δ

Pinion, G. Bryan (for Jacki Driver – Executor)
Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

	Status realing ke. Filing of the First Account ana/or retilion for Final Distribution			
DOD: 1/9/13	JACKI DRIVER was appointed Executor	NEEDS/PROBLEMS/COMMENTS:		
	with Full IAEA without bond on 12/5/13.			
]	Continued from 2/6/15, 6/25/15		
	At the hearing on 12/5/13, the Court set			
Cont from 020615,	this status hearing for the filing of the first	1. Need first account or petition for		
062515	account or petition for final distribution.	final distribution pursuant to Probate Code §12200 or verified		
Aff.Sub.Wit.		written status report pursuant to		
Verified		Local Rule 7.5.		
Inventory				
PTC				
	1			
Not.Cred.				
Notice of				
Hrg				
Aff.Mail				
Aff.Pub.				
Sp.Ntc.				
Pers.Serv.				
Conf.				
Screen				
Letters				
Duties/Supp				
Objections				
Video				
Receipt				
CI Report				
9202				
Order				
Aff. Posting		Reviewed by: skc		
Status Rpt	1	Reviewed on: 9/21/15		
UCCJEA	1	Updates:		
Citation	1	Recommendation:		
FTB Notice	1	File 5B - Rusconi		
	ı	5 D		

Francesco Di Donna (Estate) Case No. 14CEPR00080 Fanucchi, Edward L. (for Pat DeSantis – Administrator)

Attorney

Status Hearing Re: the Filing of the First Account and/or Petition for Final Distribution

DOD: 07/24/11		PAT DESANTIS, friend, was appointed	NEEDS/PROBLEMS/COMMENTS:
		Administrator with Limited IAEA and	
		without bond on 06/06/14. Letters of	CONTINUED FROM 06/11/15
		Administration were issued on 06/20/14.	Minute Order from 06/11/15 states:
2 1 1 2 2 2 2 2 2		=	The property remains unlisted at this
	nt. from 050115	inversion a repressuit, remonace initial,	time. An updated status report
06	1115	filed 11/06/14- \$350,000.00	verified by Mr. DeSantis is to be filed
	Aff.Sub.Wit.		unless the accounting is filed at least
	Verified	Status Report filed 09/22/15 states: The	two court days prior to 09/24/15.
✓	Inventory	only assets of the estate are interests in	
	PTC	various parcels of agricultural land. The	
	Not.Cred.	real properties are listed for sale but it	Need First Account and/or Petition for Final Distribution.
	Notice of	appears there are no buyers due to the drought and other factors regarding	remion for final distribution.
	Hrg	the property. The estate tax return was	Note: Status Report filed 09/22/15 is
	Aff.Mail	filed 08/31/15 without payment so that	not verified by Mr. DeSantis.
	Aff.Pub.	penalties for late filing of the return	The French Sylvin Beedinis.
		would cease. As there is no cash in the	
	Sp.Ntc.	estate, the administrator has discussed	
	Pers.Serv.	the payment due with the heirs of the	
	Conf.	estate who will be paying the estate	
	Screen	taxes due out of their own monies. The	
	Letters	two heirs at law are the surviving	
	Duties/Supp	daughters of the decedent who are	
	Objections	non-resident, non-citizen beneficiaries.	
	Video	The executor is currently talking with the CPA to discuss the manner of	
	Receipt	distribution to the heirs and what tax	
	CI Report	consequences will be imposed under	
	9202	different methods of distribution. A 90	
	Order	day continuance is requested to allow	
	Aff. Posting	for tax issues to be resolved.	Reviewed by: JF
	Status Rpt		Reviewed on: 09/21/15
	UCCJEA		Updates: 09/22/15
	Citation		Recommendation:
	FTB Notice		File 6 – Di Donna

7 Mary Jo Lane (Estate)

Case No. 14CEPR00372

Attorney

Magness, Marcus D. (for Administrator Brittney Marie Lane)

Probate Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

DO	DD: 4/3/2014	BRITTNEY MARIE LANE, daughter, was appointed Administrator on 6/5/2014. Letters issued on 6/20/2014.	NEEDS/PROBLEMS/ COMMENTS:
		Final Inventory and Appraisal filed 10/28/2014 shows an estate	
Co	ont. from 080615	value of \$284,806.04 .	OFF
	Aff.Sub.Wit.	Status Report filed 7/27/2015 for the previous Status Hearing	CALENDAR
	Verified	states:	CALLINDAR
	Inventory	The largest asset of the estate was the residence owned	Final Account
	PTC	by the Decedent; the Administrator and her attorney negotiated the sale of such property to one of the	and Report of
	Not.Cred.	creditors of the estate;	Administrator
	Notice of	 Pursuant to the agreement terms, the down payment of 	filed 9/22/2015
	Hrg	the buyer (William Jensen) satisfied the creditor's claims	is set for
	Aff.Mail	filed by Mr. Jensen, Forkner Crest Community Association,	hearing on
	Aff.Pub.	and Provident Funding Associates;	11/3/2015.
	Sp.Ntc.	 The estate balance of the purchase price is represented by a promissory note to the estate, secured by a first 	
	Pers.Serv.	priority deed of trust in such property; this transaction	Continued from
	Conf.	closed in February 2015;	<u>8/6/2015</u> . Minute
	Screen	Provident Funding Associates and Mr. Jensen signed	Order states if accounting is
	Letters 062014	satisfactions of creditor's claims [filed 4/2/2015; 5/21/2015];	filed 2 days
	Duties/Supp	Forkner Crest Community Association did not sign or	before hearing
	Objections	deliver a satisfaction or withdrawal of creditor's claim;	then Status
	Video	 A creditor's claim was filed by St. Agnes Medical Center [on 1/5/2015], and while the claim was allowed the debt 	Hearing may
	Receipt	appears to have been satisfied by Decedent's healthcare	come off
	CI Report	insurance; they are informed that no amounts are due to	calendar.
	9202	St. Agnes but it has yet to withdraw its creditor's claim;	1. Need first
	Order	In addition to working to clear the creditor's claims, the Administrator is waiting for refunds from the IRS and Franchise Tax Board, which relate to the Decedent's 2014 income tax returns; The returns were filed in April 2015, but the refunds bayes.	account and/or petition for final
		 The returns were filed in April 2015, but the refunds have not yet been received; the Administrator is contacting the IRS and the Franchise Tax Board to find out the status of the refunds; 	distribution.
	Aff. Posting	 The estate is in a position to be closed except for the 	Reviewed by: LEG
	Status Rpt	missing tax refunds and the withdrawal of the St. Agnes and Forkner Crest creditor's claims;	Reviewed on: 9/22/15
	UCCJEA	 It is anticipated that the Petition for Final Distribution will be 	Updates: 9/23/15
	Citation	filed by 8/30/2015; if the refunds are not received by the	Recommendation:
	FTB Notice	time the petition is filed, the bank account for the estate	File 7 - Lane
		will remain open and the funds distributed to an omnibus	
		clause in the order.	
			7

8 Donald Ray Henry (Estate) Case No. 14CEPR00541 Attorney Fogderude, Eric K. (for Mary Ann Henry – Executor) Probate Status Hearing Re: Filing of First and Final Distribution

DOD: 04/01/2014		MARY ANN HENRY, was appointed	NEEDS/PROBLEMS/COMMENTS:
		executor, with full IAEA authority without	
		bond on 07/24/2014.	Need First Account or Petition for
			Final Distribution.
Cont. from		Letters issued on 07/28/2014.	
Aff.Sub.	Wit.	Final Corrected Inventory and Appraisal	
Verified		filed 09/18/2015 shows an estate valued	
Inventor	ry	at \$384,228.43.	
PTC		Minute Order of 07/24/2014 set this	
Not.Cre	d.	Status Hearing for the filing of the First	
Notice of	of	and Final Distribution.	
Hrg		Status Bonort filed 00/00/2015 states the	
Aff.Mail		Status Report filed 09/08/2015 states the	
Aff.Pub.		Declarant is still in the process of determining the exact title to various	
Sp.Ntc.		assets of the estate and is anticipating	
Pers.Ser	v.	preparing and filing and amended	
Conf.		Inventory and Appraisement.	
Screen		Declarant is also in the process of	
Letters		negotiating a distribution agreement	
Duties/S		among the beneficiaries of the estate in	
Objection	ons	order to expedite the distribution	
Video		process, and it is anticipated that both	
Receipt		matters should be completed within the	
CI Repo	ort	next two or three months. The estate	
9202		will then be ready for distribution.	
Order			
Aff. Post			Reviewed by: LV
Status R			Reviewed on: 09/22/2015
UCCJEA			Updates:
Citation			Recommendation:
FTB Notice	се		File 8 – Henry

Chung Irrevocable Trust

Case No. 14CEPR00626

Attorney Tekunoff, Daniel J. and Paul Pimentel (for Petitioner Robert Chung)

Attorney Krbechek, Randolf (for Respondent Susan Hanley)

Probate Status Hearing RE: Resolution of the Case and Surcharge Issue

Helene Chung		On 07/16/14, ROBERT CHUNG ,	NEEDS/PROBLEMS/COMMENTS:
DC	D 10-6-12	Beneficiary and named successor	
		trustee, filed a Petition for Removal of	As of 09/22/15, nothing has been
		Trustee, Accounting, Surcharge to	filed in this matter since the 03/13/15
		Trustee for Damage to Estate, Damages	minute order.
Co	ont. from	for Breach of Fiduciary Duty, and	
	Aff.Sub.Wit.	Appointment of Successor Trustee.	Need Status Reports.
	Verified	At the Hearing on 09/02/14, no	
	Inventory	Response having been filed and no	
	PTC	appearances made by Respondent,	
	Not.Cred.	the Court granted the Petition.	
	Notice of	On 10/01/14, Respondent, SUSAN	
	Hrg	HANLEY, filed a Notice of Motion and	
	Aff.Mail	Motion for Order Setting Aside and	
	Aff.Pub.	Vacating Order Removing Trustee and	
	Sp.Ntc.	supporting documents.	
	Pers.Serv.	On 10/21/14, the Court vacated its	
	Conf.	previous Order removing Susan Hanley	
	Screen	as trustee.	
	Letters		
	Duties/Supp	Verified Answer to Petition for Removal	
	Objections	of Trustee, etc. was filed by Susan Hanley on 11/06/14.	
	Video	Tidriley off 11/00/14.	
	Receipt	Minute Order from hearing on 12/02/14	
	CI Report	set the matter for trial on 03/13/15.	
<u> </u>	9202	_	
<u> </u>	Order	Minute Order from trial on 03/13/15 set	
	Aff. Posting	this status hearing re Resolution of the Case and Issue of Surcharge and states:	Reviewed by: JF
	Status Rpt	Parties have reached an agreement as	Reviewed on: 09/22/15
	UCCJEA	to the removal of the Trustee and have	Updates: Recommendation:
	Citation	a formal written resignation; a written	
	FTB Notice	stipulation is being circulated for signatures. Counsel are to file written Status Reports at least 2 court days prior to 09/24/15.	File 9 - Chung

10A Francisco Javier Gonzalez (GUARD/E) Case I Attorney: David J. Thelen (for Guardian/mother Dilila Eululia Aganza) Case No. 15CEPR00257

Probate Status Hearing RE: Filing of the Inventory and Appraisal

		- Probate states nearing kt. Filling of the	
		DILILA EULULIA AGANZA , mother, was	NEEDS/PROBLEMS/COMMENTS:
		appointed guardian of the estate on	
		4/23/15.	1. Inventory and Appraisal, part 1,
		1	filed on 8/26/15 includes assets
Con	t. from 082715	Minute order dated 4/23/15 stated the	(mutual funds) that need to be
	Aff.Sub.Wit.	order was to be signed ex parte.	appraised by the Probate Referee. Need amended
 	Verified	The order appointing guardian was	inventory and appraisal.
		signed on 8/17/15 and ordered all funds	
-	Inventory	into a blocked account.	2. Inventory and appraisal filed on
-	PTC	╡	8/26/15 is only a partial inventory.
 	Not.Cred.	Letters issued on 8/20/15.	Need final Inventory and
	Notice of		appraisal or current written status
 	Hrg	Placking order signed 9/17/15 ordered	report.
I — —	Aff.Mail	Blocking order signed 8/17/15 ordered \$11,907.11 into a blocked account.	
 	Aff.Pub.	ψ11,707.11 IIIIO α biockeα accoolii.	
-	Sp.Ntc.		
-	Pers.Serv.	Inventory and Appraisal, partial no. 1,	
	Conf.	filed on 8/26/15 shows a value of	
 	Screen	\$11,325.38.	
 	Letters	┪	
 	Duties/Supp		
	Objections		
	Video		
	Receipt	_	
	CI Report		
,	9202		
	Order		
	Aff. Posting		Reviewed by: KT
;	Status Rpt		Reviewed on: 9/22/15
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 10A – Gonzalez

10A

10B Francisco Javier Gonzalez (GUARD/E) Case No. 15CEPR00257 Attorney: David J. Thelen (for Guardian/mother Dilila Eululia Aganza)

Probate Status Hearing RE: Receipt for Blocked Account

	DILILA EULULIA AGANZA, mother, was	NEEDS/PROBLEMS/COMMENTS:
	appointed guardian of the estate on	
	4/23/15.	
Cont. from	The order appointing guardian was	Need Receipt for Blocked
Aff.Sub.Wit.	signed on 8/17/15 and ordered all funds into a blocked account.	Account or current written status report pursuant to Local Rule 7.5
Verified	illo d blocked decourii.	which states in all matters set for
Inventory	Blocking order signed 8/17/15 ordered	status hearing verified status
PTC	\$11,907.11 into a blocked account.	reports must be filed no later than
Not.Cred.	1	10 days before the hearing. Status Reports must comply with
Notice of	Minute Order dated 8/27/15 set this	the applicable code
Hrg	status hearing for the filing of the	requirements. Notice of the status
Aff.Mail	receipts for blocked account.	hearing, together with a copy of
Aff.Pub.		the Status Report shall be served
Sp.Ntc.		on all necessary parties.
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order	<u> </u> -	
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 9/22/15
UCCJEA Citation	4	Updates:
FTB Notice	4	Recommendation:
FIB NOTICE		File 10B – Gonzalez

10B

11

Case No. 15CEPR00310

Petitioner

Howard Edward Flemming
Ferguson, Anita Marie (Pro Per – Fiancee – Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to

Administer Under IAEA (Prob. C. 8002, 10450)

DO	D: 7/25/14	ANITA MARIE FERGUSON,	NEEDS/PROBLEMS/COMMENTS:
		named executor without bond, is	
		Petitioner.	Continued from 5/7/15, 6/18/15, 8/13/15
		Full IAEA – need publication	The following issues remain noted:
Со	nt from 050715,	Toll IALA - Need publication	The following issues remain holed.
061	815, 081315	Will dated 3/14/04	1. Need clarification re Decedent's name:
~	Aff.Sub.Wit.		Petitioner spells the decedent's last
~	Verified	Residence: Fresno	name "FLEMMING" on the petition, but
	Inventory	Publication: Need publication	elsewhere spells it "FLEMING." Note: The
	PTC	Estimated value of estate:	will appears to reflect "FLEMING" in the decedent's handwriting on Page 1.
	Not.Cred.	Personal property: \$8,000.00	decedeni shanawining on rage 1.
	Notice of X	-	2. Need Notice of Petition to Administer
	Hrg	(\$55,000.00 encumbered for	Estate and proof of service on Anne
	Aff.Mail X	\$24,000.00)	Todd Cortez (sister) pursuant to Probate
	Aff.Pub. X	Drobata Dafaraa, Stayan Diabart	Code §8110.
	Sp.Ntc.	Probate Referee: Steven Diebert	3. Need proof of publication pursuant to
	Pers.Serv.		Probate Code §8120.
	Conf.		-
	Screen		4. This case was opened with a fee
~	Letters		waiver. Please note that upon
<u> </u>	Duties/Supp		distribution, all Court filing fees will be due.
	Objections		uoe.
	Video		
 	Receipt		
	CI Report		
	9202		
\	Order		
	Aff. Posting		Reviewed by: skc
	Status Rpt	4	Reviewed on: 9/21/15
	UCCJEA	_	Updates:
	Citation	4	Recommendation:
	FTB Notice		File 11 - Flemming

12A Attorney Attorney The Julia G. Jones 2000 Trust

Case No. 15CEPR00428

Ladley, Candace K., and Martinez, Marla, for Petitioners) Mele, James J. (for Trustee Ruth Aileen Bise – Objector)

Status Re: Amended Petition filed and Setting Trial Date

	 <u> </u>
	RACHELLE RA LELAND HERN heirs of the d
	of the trust, fi
	Bise Rios as T Representativ
Aff.Sub.Wit.	Ruth Eileen Bi
Verified	the Assets in Custody and
Inventory	to be Filed w
PTC	Attorney's Fe Duty and Atto
Not.Cred.	Interference
Notice of	Injunction & I
Hrg	for Order Enjo
Aff.Mail	Action, for Co
Aff.Pub.	A 1 11 1
Sp.Ntc.	At the hearin this status he
Pers.Serv.	amended pe
Conf.	date.
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report	
9202	
Order	
Aff. Posting	
Status Rpt	
UCCJEA	
Citation	
FTB Notice	

E ROBLES RICO and JEREMY NANDEZ, grandchildren and lecedent and beneficiaries iled a **Petition for** or Removal of Ruth Eileen Trustee and Personal ve, for Order Compelling ise Rios to Turn over All of Her Care, Possession, Control, & for Accounting ith the Court, and for es, for Breach of Fiduciary orneys' Fees, for Tortious with Right to Inherit, for Removal from Residence, oining Trustee from Using o Defend Herself in this onversion.

At the hearing on 8/6/15, the Court set this status hearing re confirmation of amended petition filed and setting trial date.

NEEDS/PROBLEMS/COMMENTS:

Note: An Amended Petition was filed 8/12/15. See Page D.

This Status page remains on calendar re trial setting.

Reviewed by: skc
Reviewed on: 9/21/15
Updates:
Recommendation:
File 12C - Jones

12A

12B Attorney Attorney The Julia G. Jones 2000 Trust

Case No. 15CEPR00428

Ladley, Candace K., and Martinez, Marla, for Petitioners)
Mele, James J. (for Trustee Ruth Aileen Bise – Objector)

First Amended Petition (1) for Suspension or Removal of Ruth Eileen Bise Rios as Trustee and Personal Representative, (2) for Order Compelling Ruth Eileen Bise Rios to Turn over All of the Assets in Her Care, Possession, Custody and Control, for Further Accounting to be Filed with the Court, and for Attorney's Fees, (3) for Breach of Fiduciary Duty and Attorneys' Fees, (4) for Tortious Interference with Right to Inherit, (5) for Injunction & Removal from Residence, (6) for Order Enjoining Trustee from Using Trust Assets to Defend Herself in this Action, (7) for Conversion

T	Linguising mostee from osting most Assets to beterior neitsell in this Action, (7) for Conversion					
	Julia G. Jones DOD: 2009		RACHELLE RAE ROBLES RICO and JEREMY LELAND	NEEDS/PROBLEMS/		
DC	DOD: 2007		HERNANDEZ, grandchildren and heirs of the	COMMENTS:		
			decedent and beneficiaries of the trust, are			
			Petitioners.	1. If Petitioners'		
				Requests to Waive		
			Petitioners allege the Trust that is the subject of this	Court Fees are not		
-			petition was created pursuant to a written	granted, need		
	Aff.Sub.Wit.		declaration of trust by JULIA G. JONES , entitled the	\$435.00 filing fee for		
1	Verified		JULIA G. JONES 2000 TRUST.	this petition.		
	Inventory		JULIA JONES died in 2009.	2. Need Order		
	PTC					
	Not.Cred.		The Trust provides that after decedent's death,			
1	Notice of		decedent's daughter, MARY VIRGINIA JONES			
	Hrg		PADILLA ("GINNA"), shall have a life estate for the			
1	Aff.Mail		exclusive use of the lower level of the decedent's residence. GINNA recently died terminating the life			
	Aff.Pub.		estate.			
	Sp.Ntc.					
	Pers.Serv.		The Trust provides that the upper level of the			
	Conf.		decedent's residence shall be held in trust for use by			
	Screen		the family members which shall include the			
			Petitioners, RUTH EILEEN BISE RIOS, GINNA and KURT			
	Letters Duties/Supp		ARNOLD . "All use of the upper level of the residence shall be subject to the discretion of the trustee and			
			the trustee shall be solely responsible for the			
	Objections		scheduling. It is expected that the trustee shall be			
	Video		reasonable and fair to all concerned, however, the			
	Receipt		discretion of the trustee is incontestable by anyone."			
	CI Report					
	9202		KURT ARNOLD, the decedent's grandson, is named			
	Order	Χ	successor Trustee upon the death of the decedent.			
	Aff. Posting		KURT ARNOLD died in 2013. Upon his death, RUTH	Reviewed by: skc/KT		
	Status Rpt		became the Successor Trustee, and is presently	Reviewed on: 9/23/15		
	UCCJEA		acting as said Trustee.	Updates:		
	Citation		Diamaga and different reserva	Recommendation:		
	FTB Notice		Please see additional page	File 12D – Jones		
				100		

12B

Since **RUTH** became Trustee, she has ousted all of the other family members from the decedent's residence, refused to allow anyone, except herself and her friends, to use the decedent's residence, contrary to the terms of the Trust, to the detriment of Petitioners.

Petitioners are informed and believe that **RUTH** is using the balance of the Trust assets to pay for the maintenance of the subject residence, to the detriment of Petitioners.

RUTH failed and refused to provide the beneficiaries of the Trust with any accountings even though Petitioners had made a reasonable request, in writing, more than 60 days ago, and the Respondent had never filed an accounting at that time. **RUTH** finally provided an accounting to the beneficiaries in her response to the within petition.

RUTH has failed and refused to give notice to Petitioners as required under Probate Code Section 16061.7

Petitioners pray for an Order of this Court:

- 1. Suspending or Removing Respondent **RUTH EILEEN BISE RIOS** as successor Trustee of the Julia G. Jones Trust dated 6/27/00;
- 2. Compelling Respondent **RUTH EILEEN BISE RIOS** to turn over all Trust assets in her possession, custody and control to a court appointed Trustee of the Julia G. Jones 2000 Trust;
- Compelling Respondent RUTH EILEEN BISE RIOS to file a further accounting with the court and serve it
 upon Petitioners and all trust beneficiaries within 30 days of the Court's Order on the Petition or such
 other time as the Court deems appropriate;
- 4. Compelling Respondent **RUTH EILEEN BISE RIOS** to surrender any Trust property in her possession, custody and control to Petitioners or alternatively suspending any powers **RUTH EILEEN BISE RIOS** holds as successor trustee pending the Court's decision on this petition;
- 5. Declaring that all actions taken by Respondent **RUTH EILEEN BISE RIOS** constitute a tortious interference with Petitioners' right to inherit from the trust, and that punitive damages should be awarded to Petitioners in an amount of **\$5,000,000.00**;
- 6. Declaring that Respondent **RUTH EILEEN BISE RIOS** hold the assets of the purported trust for the persons entitled to distribution of the trust;
- 7. Finding that Respondent RUTH EILEEN BISE RIOS is liable to Petitioners for punitive damages;
- 8. Finding that Respondent **RUTH EILEEN BISE RIOS** is liable to Petitioners for attorney fees and costs;
- 9. For such other orders as the Court may deem just and proper.

13A Jean Walters (CONS/PE)

Case No. 15CEPR00545

Attorney Attorney Attorney Kruthers, Heather H. (for Public Guardian – Petitioner)

Teixeira, J. Stanley (Court appointed for proposed Conservatee)

Petty, Teresa B., in association with Horton, Lisa M. (for Robert Renovato – Objector)

Petition for Appointment of Probate Conservator of the Person and Estate

			TEMPORARY EXPIRES 9/24/15 (Ms. Walters' placement is confidential.)	NEEDS/PROBLEMS/ COMMENTS:
	nt from 070115	,	PUBLIC GUARDIAN is Petitioner and requests appointment as Conservator of the Person with medical consent powers under Probate Code §2355	Page 13B is the competing Petition filed by Kenneth A. Kearns.
072 ✓	Aff.Sub.Wit. Verified Inventory		and dementia medication powers under Probate Code §2356.5 and as Conservator of the Estate. SEE PETITION FOR DETAILS	Continued from 9/16/15 per Minute Order dated 7/29/15, to meet up with new petition filed by Kenneth A
>	Not.Cred. Notice of Hrg			Kearns. Letters to Public Guardian also extended to 9/24/15.
>	Aff.Mail Aff.Pub.	W		Court Investigator advised rights on 6/19/15
>	Sp.Ntc. Pers.Serv. Conf.	W		Voting rights affected – need minute order
>	Screen Letters			Note: A Request for Special Notice was filed 6/22/15 by
>	Duties/Supp Objections Video Receipt CI Report			interested person Kathy Walters of Woodland Hills, CA, by her attorney, Christopher E. Overgaard of
*	9202 Order			Glendale, CA. Kathryn Walters is Ms. Walters' niece and conservator of Ms. Walters' brother Robert Walters.
				Note: If granted, the Court will set status hearings for the filing of the I&A and first account.
	Aff. Posting			Reviewed by: LEG for skc
_	Status Rpt UCCJEA Citation			Reviewed on: 9/23/15 Updates: Recommendation:
	FTB Notice			File 13A – Walters

13A

13B Jean Walters (CONS/PE)

Case No. 15CEPR00545

Attorney Shahbazian, Steven L. (for Competing Petitioner Kenneth A. Kearns, family friend)

Attorney Teixeira, J. Stanley (Court-appointed for Conservatee)
Attorney Kruthers, Heather H. (for Petitioner Public Guardian)
Attorney Petty, Teresa B. (for Objector Robert Renovato, friend)

Attorney Horton, Lisa M. (by association, also for Objector Robert Renovato, friend)

Attorney Overgaard, Christopher E., of Glendale (for Kathy Walters, niece, of Woodland Hills)

Petition for Appointment of Probate Conservator of the Person and Estate

			KENNETH A. KEARNS, family friend, is Petitioner	N
			and requests appointment as Conservator of the Person with medical consent and dementia powers to administer dementia medications, and	C R
Co	ont. from		for placement in a secured-perimeter facility;	V
	Aff.Sub.Wit.		and of the Estate with bond.	N
√	Verified			1
√			~Please see Petition for details~	
	Inventory			
	PTC			
	Not.Cred.		Court Investigator's Report was filed on	
✓	Notice of		9/21/2015.	
	Hrg Aff.Mail	W/		
✓		۷٧/		
	Aff.Pub.			2
	Sp.Ntc.			2
✓	Pers.Serv.			
✓	Conf.			
	Screen			
✓	Letters			3
	Duties/Supp	Χ		
	Objections			
	Video	Χ		
	Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			R
	Status Rpt			R
	UCCJEA			U
✓	Citation			R
	FTB Notice			F

NEEDS/PROBLEMS/COMMENTS:

Court Investigator Advised Rights on 9/2/2015.

Voting Rights Affected – Need Minute Order.

- Estimated value of the estate in the Petition calculates as \$86,741.00. Therefore, Bond is required in the sum of \$95,415.10 pursuant to Probate Code § 2320 and CA Rule of Court 7.207.
- Need Duties of Conservator form signed by Petitioner to be filed with the Court.
- Need Conservatorship Video Viewing Certificate from Petitioner pursuant to Local Rule 7.15.8(A) to be filed with the Court.

~Please see additional page~

Reviewed by: LEG
Reviewed on: 9/23/15
Updates:

Recommendation:

File 13B – Walters

13B Additional Page, Jean Walters (CONS/PE) Case No. 15CEPR00545

NEEDS/PROBLEMS/COMMENTS, continued:

4. Petition requests authority to sell the Conservatee's personal residence, but does not include information pursuant to Probate Code § 2540 which states the Conservator shall inform the court as to whether the Conservatee supports or is opposed to the proposed sale. Need declaration as required by Probate Code § 2540(b) regarding discussion with Conservatee regarding proposed sale.

<u>Note</u>: Item 9(a)(5) of the Capacity Declaration filed 5/27/2015 indicates a "locked or secured-perimeter facility is NOT the least restrictive environment" appropriate for the needs of proposed Conservatee.

Note: If Petition is granted, Court will set status hearings as follows:

- Monday, October 26, 2015 at 9:00 a.m. in Dept. 303 for filing proof of bond;
- Monday, January 25, 2016 at 9:00 a.m. in Dept. 303 for filing of inventory and appraisal; and
- Monday, November 28, 2016 at 9:00 a.m. in Dept. 303 for filing of first account of the conservatorship.

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.

14 Dylan Matney (GUARD/P)

Petitioner: Carol Jean Steinhauer (pro per)

Petitioner: Don Mannon (pro per)

Petition to Appoint Guardian of the Person

		THERE IS NO TEMPORARY. No temporary was	NEEDS/PROBLEMS/COMMENTS:
		requested.	
			Continued from 8/27/15.
		CAROL STEINHAUER and DON MANNON, non-	Minute order states the court orders Jamie Matney to report
Со	nt. from 082715	erelatives, are petitioners.	forthwith to Avertest to submit
	Aff.Sub.Wit.	Please see petition for details.	to a drug test paid for by
1	Verified		Petitioners. Avertest is ordered
Ľ		DSS Social Worker Report filed 8/12/15	to release the test results to
	Inventory	Court Investigator Report filed on 9/21/15	Jaimy Matney and she is
	PTC		ordered to bring the results to
	Not.Cred.		court on 9/24/15. The Court finds the report of the Social
			Worker unhelpful and orders
	Hrg		the Court Investigator to
			interview all parties and make
	Aff.Pub.		a recommendation to the
	Sp.Ntc.		Court.
	Pers.Serv.		1
1	Conf.		Need Notice of Hearing.
	Screen		2. Need proof of personal
✓	Letters		service of the Notice of
√	Duties/Supp		Hearing along with a copy of the petition or Consent
	Objections		and Waiver of Notice or
	Video		Declaration of Due
	Receipt		Diligence on:
✓	CI Report		a. Father
	9202		
1	Order		
	Aff. Posting		Reviewed by: KT
	Status Rpt		Reviewed on: 9/21/15
1	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 14 – Matney
			14

14

Case No. 15CEPR00633

William Cooper, Richard Cooper (GUARD/P)Case No. 15CEPR00716 Cooper, Tammy Lynn (pro per - paternal aunt) 15

Petitioner

Petition for Appointment of Guardian of the Person

Ric	hard, 6	TEMPORARY EXPIRES 09/24/15	NEEDS/PROBLEMS/ COMMENTS:
Wil	liam, 4	TAMMY LYNN COOPER, paternal aunt, is Petitioner.	
		Father: RICHARD EVERETT COOPER, SR. – Consent & Waiver of Notice filed 08/03/15	
Со	nt. from	Mother: SHANNON CAYSON – Personally served on	
	Aff.Sub.Wit.	07/29/15	
✓	Verified		
	Inventory	Paternal grandfather: GARY COOPER - deceased Paternal grandmother: MARY COOPER – Served by mail	
	PTC	on 08/04/15	
	Not.Cred.		
✓	Notice of	Maternal grandfather: DECEASED	
	Hrg	Maternal grandmother: VICKI BURROS – served by mail on	
<u> </u>	Aff.Mail w/	08/04/15	
	Aff.Pub.	Siblings: DESTINY THOMAS (16), ANTHONY CALDWELL (24);	
	Sp.Ntc.	ANGELICA GARDEA (1) – Destiny & Anthony served by	
√	Pers.Serv. w/	mail on 08/04/15	
√	Conf. Screen	Battle and a data for a Datition for all bailed	
√	Letters	Petitioner states [see Petition for details].	
<u>·</u>	Duties/Supp	Court Investigator Dina Calvillo filed a report on 09/21/15.	
	Objections Objections	·	
	Video		
	Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		Reviewed by: JF
	Status Rpt		Reviewed on:
✓	LICC IF A		09/22/15
Ľ	UCCJEA		Updates:
	Citation FTB Notice		Recommendation:
L	LIR NOIICE		File 15 - Cooper

Nickolas Gutierrez, Matthew Gutierrez (GUARD/P) Case No. 15CEPR00723 Bakergumprecht-Davies, Kathleen (for Sonia Gutierrez-Covarrubias – paternal aunt/Petitioner)

Petition for Appointment of Guardian of the Person

Nic	ckolas, 5		TEMPORARY EXPIRES 09/24/15	NEEDS/PROBLEMS/COMMENTS:
	ont. from		SONIA GUTIERREZ-COVARRUBIAS, paternal aunt, is Petitioner. Father: RENE GUTIERREZ-COVARRUBIAS – personally served on 08/25/15	Need proof of service by mail at least 15 court days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the
	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order	X	Mother: VERONICA MORENO – personally served on 08/21/15 Paternal grandfather: FIDEL GUTIERREZ Paternal grandmother: VELIA GUTIERREZ Maternal grandfather: NOT LISTED Maternal grandmother: ROSA SALDANA Petitioner states [see petition for details]. Court Investigator Dina Calvillo filed a report on 09/21/15.	Person or Consent & Waiver of Notice or Declaration of Due Diligence for: a. Fidel Gutierrez (paternal grandfather) b. Velia Gutierrez (paternal grandfather) c. Maternal grandfather d. Rosa Saldana (maternal grandmother)
✓	Aff. Posting Status Rpt UCCJEA Citation FTB Notice			Reviewed by: JF Reviewed on: 09/22/15 Updates: Recommendation: File 16 – Gutierrez

17 Susan Padavick (Det. Succ) Case No. 15CEPR00774
Attorney Dornay, Val J (for Robert Torres and Marlene Padavick – Petitioners)
Petition to Determine Succession to Real Property

DO	D: 05/11/2015	ROBERT TORRES, spouse, and MARLENE PADAVICK, mother, are petitioners.	NEEDS/PROBLEMS/COMMENTS:
		40 days since DOD	
Со	nt. from	No other proceedings.	
	Aff.Sub.Wit.		
✓	Verified	I&A - \$110,000.00	
1	Inventory	Decedent died intestate	
	PTC	Petitioner requests Court determination	
	Not.Cred.	that decedent's 100% interest in real	
✓	Notice of Hrg	property located at 4617 E. Terrace Ave. Fresno, Ca. pass ½ to Robert Torres	
1	Aff.Mail	and ½ to Marlene Padavick pursuant to	
	Aff.Pub.	intestate succession.	
	Sp.Ntc.		
	Pers.Serv.		
	Conf.		
	Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video		
	Receipt CI Report		
	9202		
1	Order Order		
	Aff. Posting		Reviewed by: LV
	Status Rpt		Reviewed on: 09/23/2015
	UCCJEA		Updates: Submitted
	Citation		Recommendation:
	FTB Notice		File 17 – Padavick

17

18 Sidney Lehman (Estate)

Case No. 15CEPR00777

Attorney Lee, Jim D. (of Hanford for Sandy Duane Queen – Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA

DOD: 05/15/2015			SANDY DUANE QUEEN, named	NE	EDS/PROBLEMS/COMMENTS:
			executor without bond, is petitioner.		
			E #44E4	1.	Need date of death of the
			Full IAEA – o.k.		deceased spouse pursuant to Local Rule 7.1.1D.
Со	Cont. from		Will dated: 07/05/2012		Local Role 7.1.1D.
	Aff.Sub.Wit.	s/p	77 m darout 677 667 267 2	2.	Need date of death of the Sandy
1	Verified		Residence: Fresno		Duane Queen, Uncle of
	Inventory		Publication: The Business Journal		Predeceased Spouse listed at #8 of the petition, pursuant to Local
	PTC		Estimated value of the Estate:		Rule 7.1.1D.
	Not.Cred.		Personal property -\$500,000.00		
1	Notice of		Drala sita Dafara a Diali Craitle	3.	Need Notice to Irene Magee
	Hrg		Probate Referee: Rick Smith		pursuant to the Request for
✓	Aff.Mail	w/			Special Notice filed 09/16/2015.
1	Aff.Pub.				
	Sp.Ntc.				ote: If the petition is granted status arings will be set as follows:
	Pers.Serv.				_
	Conf.				• Thursday, 02/25/2016 at
	Screen				9:00a.m. in Dept. 303 for the filing of the inventory and appraisal
✓	Letters				and
✓	Duties/Supp				• Thursday, 12/01/2016 at
	Objections				9:00a.m. in Dept. 303 for the filing
	Video				of the first account and final
	Receipt				distribution.
	CI Report			ъ	religant to Local Dula 7.5 if the required
	9202				rsuant to Local Rule 7.5 if the required ocuments are filed 10 days prior to the
✓	Order			he	arings on the matter the status
					earing will come off calendar and no
	A# Do-12				pearance will be required.
	Aff. Posting			-	viewed by: LV
	Status Rpt UCCJEA				viewed on: 09/22/2015 odates:
	Citation			_	commendation:
	FTB Notice				e 18 – Lehman
	. 15 HOREC				18

19 John A. Kochergen (Estate)

Case No. 15CEPR00779

Attorney Matlak, Steven M. (for Mike J. Kochergen and Ann J. Shuken – Petitioners – Children)
Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA

DC	DOD: 06/20/2015		MIKE J. KOCHERGEN, son, and ANN J.	NEEDS/PROBLEMS/COMMENTS:
			SHUKEN, daughter, and named co-	Nickey William on a Pilliam in a superinte el atactura
			executors without bond, are petitioners.	Note: If the petition is granted status hearings will be set as follows:
			permeners.	
Со	Cont. from		Full IAEA – o.k.	• Thursday, 02/25/2016 at
-	Aff.Sub.Wit.	s/p	Will date dt 00/11/0014	9:00a.m. in Dept. 303 for the filing of the inventory and appraisal
✓	Verified		Will dated: 02/11/2014	and
	Inventory		Residence: Fresno	
	PTC		Publication: The Business Journal	• Thursday, 12/01/2016 at
	Not.Cred.		F.P. and advantage of all the control of	9:00a.m. in Dept. 303 for the filing of the first account and final
1	Notice of		Estimated valued of the estate: Unknown	distribution.
	Hrg	l .	Olikilowii	
✓	Aff.Mail	w/	Probate Referee: Rick Smith	Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the
✓	Aff.Pub.			hearings on the matter the status
	Sp.Ntc.			hearing will come off calendar and no
	Pers.Serv.			appearance will be required.
	Conf.			
	Screen	l		
✓	Letters			
√	Duties/Supp			
	Objections			
	Video			
	Receipt	l I		
	CI Report	l I		
	9202			
✓	Order			
	Aff. Posting			Reviewed by: LV
	Status Rpt			Reviewed on: 09/22/2015
	UCCJEA	I		Updates:
<u> </u>	Citation			Recommendation: Submitted
	FTB Notice			File 19 – Kochergen
				19

20 John Martin Gonsalves (Estate)

Case No. 15CEPR00780

Attorney Bagdasarian, Gary G. (for Wendy D. Hunt – Petitioner – Daughter)

Petition for Probate of Will and for Letters Testamentary with IAEA

DC	D: 10/06/2014		WENDY D. HUNT, daughter/named	NEEDS/PROBLEMS/COMMENTS:
			executor without bond, is petitioner.	
			Full IAEA — o.k.	Need Affidavit of Publication in the correct newspaper pursuant to Local Rule 7.9A. Petition indicates
Со	nt. from		Will dated: 02/26/2014	residence was in Fowler therefore the
	Aff.Sub.Wit.	s/p		correct publication should be The
1	Verified		Residence: Fowler	Fowler Ensign. Petitioner published in
	Inventory		Publication: The Business Journal	The Business Journal.
	PTC		Estimated value of the Estate:	Note: If the petition is granted status
	Not.Cred.		Personal property - \$597,763.00	hearings will be set as follows:
1	Notice of			
	Hrg		Probate Referee: Steven Diebert	• Thursday, 02/25/2016 at
✓	Aff.Mail	w/		9:00a.m. in Dept. 303 for the filing of the inventory and appraisal
✓	Aff.Pub.			<u>and</u>
	Sp.Ntc.			• Thursday, 12/01/2016 at
	Pers.Serv.			9:00a.m. in Dept. 303 for the filing
	Conf.			of the first account and final
	Screen			distribution.
✓	Letters			Pursuant to Local Rule 7.5 if the required
✓	Duties/Supp			documents are filed 10 days prior to the hearings on the matter the status
	Objections			hearing will come off calendar and no
	Video			appearance will be required.
	Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: LV
	Status Rpt			Reviewed on: 09/22/2015
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 20 – Gonsalves
	·			20

20

Attorney Shepard, Jeff S. (for Petitioners Rosie F. Ybarra and Lupe F. Ybarra)

Spousal or Domestic Partner Property Petition

DOD: 7/23/1975			ROSIE FLORES YBARRA and LUPE FLORES	NEEDS/PROBLEMS/COMMENTS:
			YBARRA, daughters and Co-Administrators	
			of the Estate of ERNESTINA YBARRA (spouse,	Note Re Related Case: Status
			DOD 11/6/1981), are Petitioners.	Hearings are set in the Estate of
Cont. from				Ernestina Ybarra, Case 15CEPR00453, on 11/12/2015
	Aff.Sub.Wit.			for filing of inventory and
1	Verified		No other proceedings.	appraisal; and on <u>8/11/2016</u> for
	Inventory			filing of the first account and/or petition for final distribution.
	PTC		Decedent died intestate.	permorrior in ar distribution.
	Not.Cred.			
1	Notice of			
	Hrg		Petitioners state Decedent and Ernestina	
✓	Aff.Mail	W/	Ybarra were married on 9/11/1934 in Phoenix, Arizona, and all property was	
	Aff.Pub.		purchased by Decedent and Ernestina	
	Sp.Ntc.		during the marriage, and paid for using	
	Pers.Serv.		funds earned during the marriage.	
	Conf.			
	Screen			
	Letters		Petitioners request Court determination that	
	Duties/Supp		real property located on Manning Avenue,	
	Objections		Fresno, passes to Petitioners as Co-	
	Video		Administrators of the Estate of Ernestina	
	Receipt		Ybarra, and Court confirmation that real	
	CI Report		property located on Manning Avenue,	
	9202		Fresno, belongs to Petitioners as Co- Administrators of the Estate of Ernestina	
✓	Order		Ybarra.	
	Aff. Posting			Reviewed by: LEG
	Status Rpt			Reviewed on: 9/22/15
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 21 – Ybarra

Petitioner: Sarah Melcher (pro per)

Petition for Appointment of Temporary Guardian of the Person

			GENERAL HEARING 11/3/15.	NEEDS/PROBLEMS/COMMENTS:
Co	nt. from 09101	5	SARAH MELCHER, maternal grandmother, is petitioner. Please see petition for details.	Continued from 9/10/15. Minute order states Examiner notes are provided in open court.
√	Aff.Sub.Wit.		·	Notice of Hearing filed on 9/22/15 is incomplete. It does
	Inventory PTC			not state what was filed, and who the filing party is at #1.
✓	Not.Cred. Notice of Hrg Aff.Mail Aff.Pub.			2. Proof of personal service on the father, Douglas Gonzalez does not indicate that the Notice of Hearing was served with a copy
<u> </u>	Sp.Ntc.			of the temporary petition as required.
1	Pers.Serv.	W/O		104011041
1	Conf. Screen			
1	Letters			
√	Duties/Supp			
	Objections Video Receipt CI Report 9202 Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 9/21/15
1	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 22 – Luna

Petitioner Boos, Roger Keith (Pro Per Petitioner)

Petition for Appointment of Temporary Guardian of the Person

	General Hearing set for 11/16/2015	NEEDS/PROBLEMS/COMMENTS:
	General fleating set for 11/10/2013	14LLD3/1 ROBLEMS/COMMENTS.
	ROGER KEITH BOOS, non-relative, is Petitioner.	Need Notice of Hearing.
Comb from	=	2. Need proof of five (5)
Cont. from	~Please see Petition for details~	court days' notice by
Aff.Sub.Wit.	~riease see reillion for defails~	personal service of the
√ Verified		Notice of Hearing with a copy of the Petition for
Inventory		Appointment of Temporary
PTC		Guardian, or Consent to
Not.Cred.]	Appointment of Guardian
Notice of X]	and Waiver of Notice, or a
Hrg		Declaration of Due Diligence for:
Aff.Mail		Carolyn Zack, mother, if
Aff.Pub.		Court does not excuse
Sp.Ntc.		notice as Petitioner
Pers.Serv. X		requests;
✓ Conf.		• father.
Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
√ Order		
Aff. Posting		Reviewed by: LEG
Status Rpt		Reviewed on: 9/22/15
√ UCCJEA		Updates:
Citation]	Recommendation:
FTB Notice		File 23 – Zack

24 Cynthia Carla Chavez (CONS/PE)

Case No. 12CEPR00809

Attorney: Catherine A. Amador (for former Conservators of the estate and current conservators of the person Manuel Chavez and Susan Chavez-Leon)

Attorney: Heather H. Kruthers (for current Conservator of the estate, Public Guardian)

Sixth Amended First Account and Report of Conservators; Petition for Allowance of Fees to Attorney for Conservators.

	MANUEL CHAVEZ, father, and	NEEDS/PROBLEMS/COMMENTS:
	SUSAN CHAVEZ-LEON, sister, Co-	
	Conservators of the Person and	Continued from 9/16/15. Minute order
	Estate, are Petitioners.	states matter continued for a report from
Cont. from 062415,		the Public Guardian as stated on the
091615		6/24/15 minute order.
Aff.Sub.Wit. Verified Inventory PTC		Minute order from 6/24/15 states the Court Orders Ms. Amador to file any additional papers that may assist the Court in ruling on the Sixth Amended First Account by 9/2/15. The Court further orders the Public
Not.Cred. Notice of Hrg		Guardian to review the Sixth Amended Account and make any and all recommendations to the Court regarding
Aff.Mail Aff.Pub.		its settlement and/or surcharges to be imposed against the former conservators,
Sp.Ntc.		and to file said report by 9/2/15. As of 9/21/15 no additional documents have
Pers.Serv.		been filed.
Conf.		been med.
Screen		Note: Manual Chavez and Susan Chavez-
Letters		Leon were removed as Co-Conservators of
Duties/Supp		the Estate and the Public Guardian
Objections		appointed by minute order dated
Video Receipt		12/11/15.
CI Report		Upon cursory review, the sixth amended first account does not
9202		balance. Charges total \$321,123.66
Order		and Credits total \$317,826.30. Property on hand at the end of the account period totals \$237.282.98. Therefore examiner has not reviewed the rest of the pleadings.
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 9/21/15
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 24 - Chavez

Rodolfo Cortez Castillo (Estate) Case No. 15CEPR00746 25

Petitioner Castillo, Marilynn De La Cruz (Pro Per – Daughter)

Petition for Letters of Administration; Authorization to Administer Under IAEA

DOD: 07/05/2015			MARILYNN DE LA CRUZ CASTILLO,	NEEDS/PROBLEMS/COMMENTS:
-			daughter, requests appointment as	
			Administrator without bond.	Minute Order of 09/17/2015: Ms.
				Castillo is sworn and testifies that the
0 1 (001717			All heirs waive bond.	decedent did not have a registered
Cont. from 091715		5		domestic partner or children. The
	Aff.Sub.Wit.		Full IAEA – o.k.	Court indicates that bond will be
 	Verified			required; matter continued in order
	Inventory		Decedent died intestate	for Ms. Castillo to look into her bondability.
	PTC		Residence: Fresno	bondubility.
	Not.Cred.		Publication: The Fresno Bee	Note: Petitioner filed an Inventory
1	Notice of			and Appraisal (partial no. 1)
•	Hrg		Estimated value of the Estate:	however it has not been appraised
1	Aff.Mail	w/	Personal property - \$48,014.00 Real property - \$700,000.00	by the Probate Referee.
1	Aff.Pub.		<u>Less encumbrances - \$198,000.00</u>	Note: If the petition is granted status
Ě			Total - \$550,014.00	hearings will be set as follows:
	Sp.Ntc.			The same of same 200 (05 (001 / cat
	Pers.Serv.		Probate Referee: Steven Diebert	• Thursday, 02/25/2016 at
	Conf.			9:00a.m. in Dept. 303 for the filing
	Screen			of the inventory and appraisal
✓	Letters			<u>and</u>
1	Duties/Supp			• Thursday, 12/01/2016 at 9:00a.m. in Dept. 303 for the filing
	Objections			of the first account and final
	Video			distribution.
	Receipt			distribution.
	CI Report			Pursuant to Local Rule 7.5 if the required
	9202			documents are filed 10 days prior to the
	Order			hearings on the matter the status hearing
🗸	Jidei			will come off calendar and no
				appearance will be required.
	Aff. Posting			Reviewed by: LV
	Status Rpt			Reviewed on: 09/22/2015
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 25 – Castillo
<u> </u>		•		